

2005 Mini-White House Conference on Aging

**Preparing for the Boom: The Access and Development of Health and Financial
Information Across the Lifespan**

September 27, 2005

The New York Athletic Club, New York, NY

POST EVENT SUMMARY REPORT

Title of Conference:

Preparing for the Boom: The Access and Development of Health and Financial
Information Across the Lifespan

Number of Persons Attending:

115

Sponsoring Organizations:

ZivaContinuum, Financial Planning Association, American Bar Association-Senior
Lawyers Division

Welcome Speaker:

Michael Berne, Chief Executive Officer, ZivaContinuum

Moderator:

Robert Blancato, President, Matz, Blancato & Associates

WHCoA Speaker:

The Honorable Dorcas R. Hardy, Chairman of WHCoA Policy Committee

Expert Panel Speakers:

Tracy Callahan, Chief Operating Officer, ZivaGuide

Topic: Emerging Issues: The Access of Healthcare Information

Ellen Eichelbaum, Corporate Gerontologist, The Speakeasy Group

Topic: Opportunity and Role of Corporate America

Monsignor Charles Fahey, Fordham University

Topic: Identifying and Meeting the Holistic Needs of the Aging

Dr. Rubin Cooper, F.A.A.P., F.A.C.C., Weill-Cornell Medical College

Topic: Utilization of Technology to Educate and Inform

Walter Burke, Esq., ABA, Senior Lawyers Division
Topic: The Informed Decision

Jerry Schwartz, CFP, Financial Planning Association
Topic: Changing Expectations and Emerging Trends

Robert Abrams, Chairman & President, ZivaContinuum
Topic: Innovative Technology to Improve the Quality of Life of Aging Americans:
The Role of the Public and Private Sector

Priority Issue:

Maximizing Access to Healthcare and Financial Information

Goal of the Conference:

To encourage associations and corporations, private and public, to engage in discussions to promote awareness to Americans and guide them through the healthcare and financial planning necessary during their lifespan.

Background:

America has entered an unprecedented information age. As Americans age, information is a vital component of planning across the lifespan. This is especially true with respect to assisting individuals and families to make informed choices and decisions about financial planning for their later years to accommodate changing circumstances and health care needs.

Barriers:

There continue to be gaps and barriers that inhibit all Americans from taking advantage of information which can assist them in healthcare and financial planning. These obstacles include the ongoing digital divide in our nation and the inability of individuals to navigate through the wealth of information that is available through multiple sources.

Expert Panel Discussion:

It was the consensus of the expert panel that Americans must be able to access the important and critical information they will need to make informed decisions. Additionally, the panel expressed a sense of urgency in getting this information to the forefront of each individual.

Attendee Participation/Comments:

The attendees agreed that corporations and associations, public and private, should take the lead in helping to educate and guide Americans through the maze of information to lead them to the right choices for themselves and their loved ones. Additionally, it was publicly noted that it will be necessary to translate all emerging issues into the native language of individuals with limited English language skills in order to provide them with equal access to the same information.

Proposed Solutions:

Encourage more public-private partnerships dedicated to improving access and utilization of all forms of information to assist individuals and families to plan throughout the lifespan in financial and health matters.

Encourage Congress to examine the extent of gaps and barriers that exist which serve to deny some Americans from having all necessary tools to assist in planning along the lifespan and propose appropriate legislative remedies.

Provide incentives for new innovative information development initiatives which achieve universal dissemination through centralized or one-stop information centers.

Initiate a national public service campaign with public-private support tied to the start of each school year to encourage Americans to review and update their plans for their future, especially financial and healthcare planning.